

IN THE CLAIMS:

1 1. (Currently Amended) A financial services outsourcing method for facilitating out-
2 sourcing of tax return preparation services for numerous clients on behalf of plural direct
3 service providers serving the numerous clients, the financial services being outsourced to
4 a given outsourcing group, the clients comprising a first set of clients in a first country,
5 having tax return filing obligations for the first country, and comprising a second set of
6 clients in a second country having tax return filing obligations for the second country, the
7 method comprising:

8 for plural respective direct service providers, loading, onto a remotely accessible
9 part of a common host server, client specific financial files and corresponding reference
10 materials, the host server providing access to a remote computer client of information
11 concerning the ~~ultimate~~ client specific financial files and corresponding reference materi-
12 als;

13 ~~retaining preparing outsourced personnel to prepare~~ tax returns for the clients of
14 the direct service providers by outsourced personnel, the outsourced personnel ~~preparing~~
15 ~~the tax returns while~~ located outside the first and second countries;

16 providing the outsourced personnel limited access to the server;

17 the outsourced personnel preparing the tax returns through a remote limited ac-
18 cess client located outside the first and second countries connected to the host server;
19 and,

20 monitoring and reporting ~~the a~~ status of the tax returns preparation financial ser-
21 vice project.

1 2. (Original) The method according to claim 1, wherein the tax return preparation ser-
2 vices comprise individual tax return preparation services.

1 3. (Original) The method according to claim 1, wherein the tax returns are outsourced
2 through an intermediary firm to the outsourced personnel.

- 1 4. (Currently Amended) The method according to claim 3, further comprising the inter-
2 mediary service-firm interacting with the outsourced personnel through use of a servicing
3 computer system, and interacting with the plural direct service providers through use of
4 the servicing computer system.
- 1 5. (Original) The method according to claim 3, wherein the direct service providers com-
2 prise accounting firms.
- 1 6. (Original) The method according to claim 1, wherein the host server provides limited
2 screen shot access to the remote client computer of information concerning the client
3 specific financial files and corresponding reference materials.
- 1 7. (Original) The method according to claim 6, wherein the host server comprises a CI-
2 TRIX server.
- 1 8. (Currently Amended) The method according to claim 2, wherein the host server pro-
2 vides limited screen shot access to the remote client computer of information concerning
3 the ~~ultimate~~ client specific financial files and corresponding reference materials.
- 1 9. (Original) The method according to claim 8, wherein the host server comprises a CI-
2 TRIX server.
- 1 10. (Original) The method according to claim 1, wherein the host server comprises an
2 ASP server running tax software for use by plural independent direct service providers
3 provided with access to the ASP server.
- 1 11. (Original) The method according to claim 2, wherein the host server comprises an
2 ASP server running tax software for use by plural independent direct service providers
3 provided with access to the ASP server.

- 1 12. (Original) The method according to claim 1, wherein the corresponding reference ma-
2 terials comprise image files of physical reference materials.
- 1 13. (Original) The method according to claim 1, wherein the client specific financial files
2 and corresponding reference materials comprise tax filer specific tax file and image files.
- 1 14. (Original) The method according to claim 13, further comprising loading onto the
2 remotely accessible part of the host server tax preparation software.
- 1 15. (Original) The method according to claim 1, wherein the outsourced personnel pre-
2 pare tax returns while located in India.
- 1 16. (Original) The method according to claim 1, further comprising a given direct service
2 provider interviewing a tax filer and obtaining supporting documentation for the tax
3 filer's tax return.
- 1 17. (Original) The method according claim 16, wherein the direct service provider com-
2 prises an accounting firm.
- 1 18. (Original) The method according to claim 16, wherein the supporting documentation
2 comprises the last season tax return as filed, receipt, and summary information regarding
3 finances of the tax filer.
- 1 19. (Original) The method according to claim 18, further comprising the given direct ser-
2 vice provider setting up a tax file compatible with a given tax software package, and ren-
3 dering the supporting documentation electronic.
- 1 20. (Original) The method according to claim 19, wherein rendering the supporting docu-
2 mentation electronic comprises scanning supporting documents into image files.